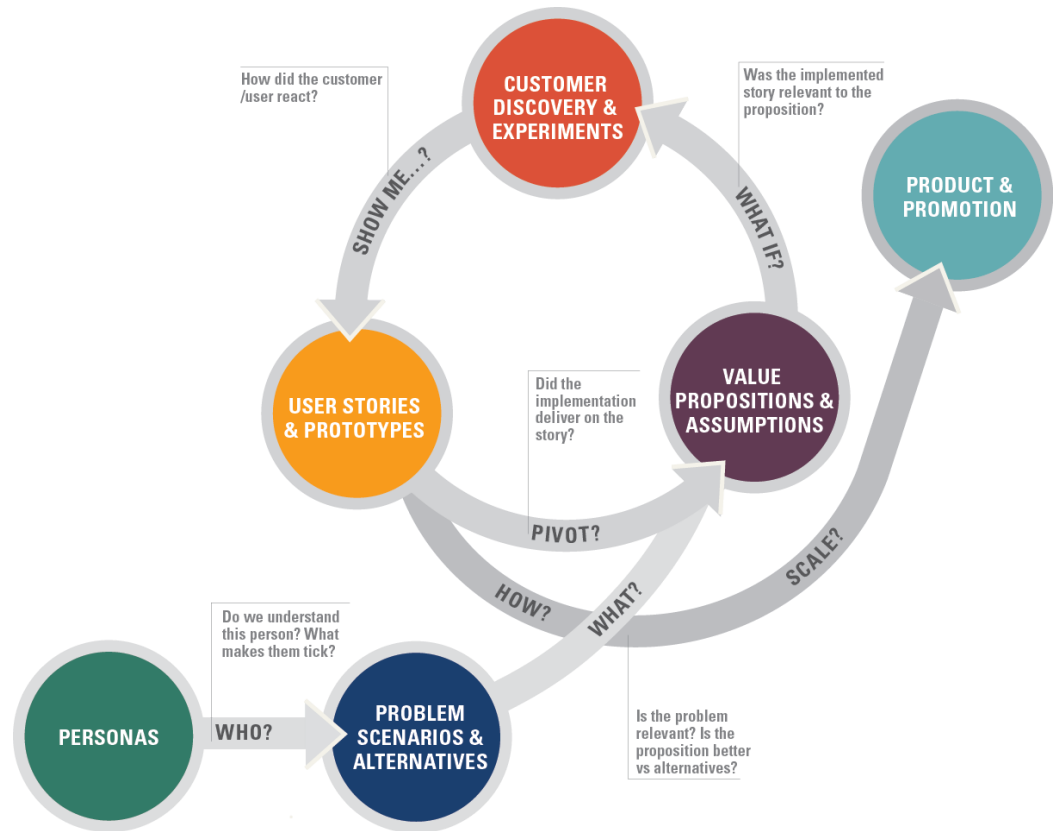


# Venture Design Template

**NOTE: To make yourself an editable copy of the template, go to the 'File' menu and then use either 'Make a copy' or 'Download As'**



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# Background & Introduction

## What is this?

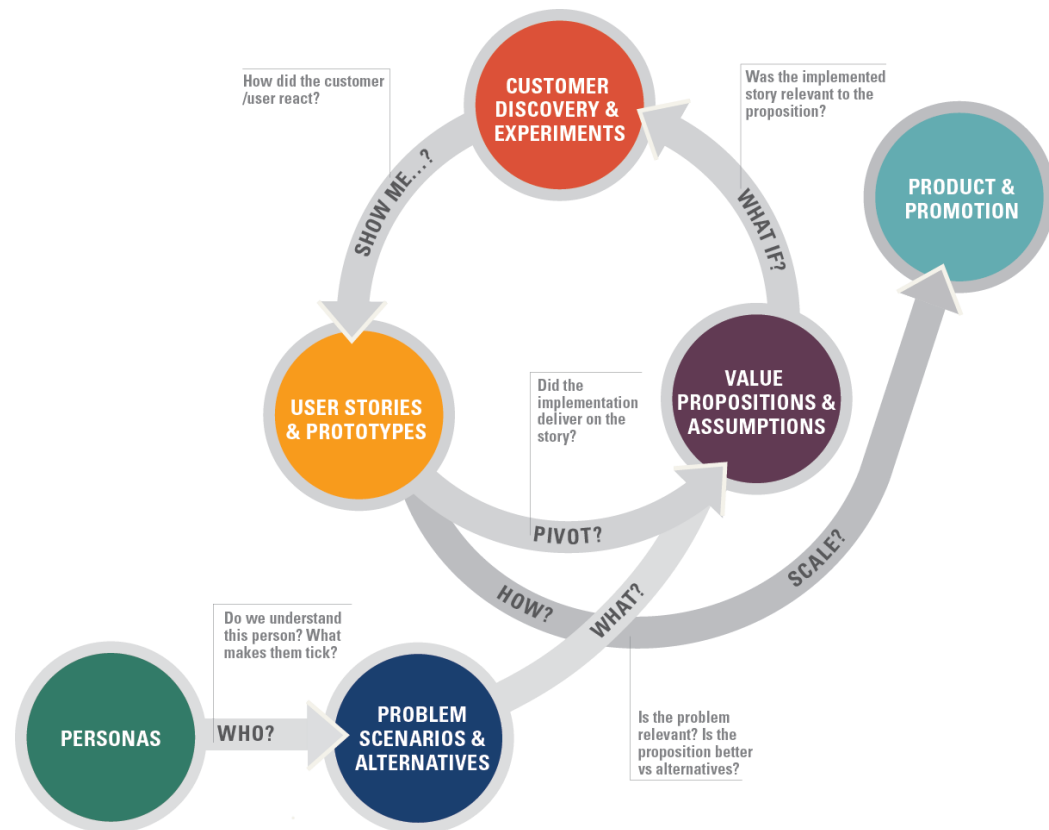
This template supports my [Venture Design](#) curriculum, a systematic process for creating new products and ventures. Venture Design draws on leading frameworks & tools like design thinking, Lean Startup, Business Model Canvas, and agile.

It's not just an amalgam. The key to use these frameworks effectively in the time you have is knowing what to do when, and that's the focus of Venture Design.

I may not be meeting you at the very beginning of your project, but I think you'll find that the framework also works well in reverse. containing tutorials, examples, and workshops.

## Who's it for?

This template is for anyone who's looking to organize information about their product/market fit (or product/user fit if an internal IT project) using design



thinking and lean principles.

## How do you use the Google Doc?

### I use (or will use) Google Doc's

If you have Google Doc's, you can just save a copy of this file into your own domain: File >> Make a Copy. If you don't have Google Doc's (Apps) and want it, you can see about setting up [here](#). That said you absolutely do NOT need to set up Google App's to use the template.

### I don't use Google Doc's

If you do not have Google Doc's just go to File >> Download As and from there you can save it to MS Word, etc.

## Are there any restrictions on using this template?

The template's primary purpose is to help practitioners create better products. You're free to use it and adapt it for internal purposes- building your company and/or product, basically.

You're not free to take it and re-post it elsewhere or create derivative work for general consumption outside the context of your company's internal operations. (You are, of course, free to link here to the original item- sharing is caring.) For the full terms and conditions, please see [www.alexandercowan.com/legal](http://www.alexandercowan.com/legal).

## 0. What's the business?

First off, let's make sure we've defined what we think this business is about.

### What is the positioning statement?

#### **NOTES**

This is a good way to do an early litmus test of how far along you are on formulating the business. You should, of course, feel free to come back to it and revise it often in these early phases.

Geoff Moore (of [Crossing the Chasm](#)) offers this syntax for a positioning statement:

For (target customer) who (statement of the need or opportunity), the (product name) is a (product category) that (statement of key benefit – that is, compelling reason to buy). Unlike (primary competitive alternative), our product (statement of primary differentiation).

#### **EXAMPLE POSITIONING STATEMENT FROM [ENABLE QUIZ](#)**

The positioning statement for Enable Quiz is [brackets added to help you connect it with the item below only]:

*For [hiring managers] who [need to evaluate technical talent], [Enable Quiz] is a [talent assessment system] that [allows for quick and easy assessment of topical understanding in key engineering topics]. Unlike [formal certifications or ad hoc questions], our product [allows for lightweight but consistent assessments of technical talent].*

For Second Tier Telecom Companies who need to improve their services offer with a entertainment portal, the MYOTT.tv is a white label OTT portal that provides access to entertainment such as movies, tv shows and related video content. Unlike Netflix, our product consists on a low cost OTT portal that provide features as, I - OTT content aggregator of the major OTT providers (HBO, TNT, FOX...) through metadata, II - EPG guide and program description to match the company cable offer, III - SVOD, IV - TVOD, V - Web, iOS and Android

# 1. Personas

In this section, you'll create a humanized view of your customer, be they buyer and/or user of your product. Turns out, this is the most actionable way to anchor just about any development activity.



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

## [Ana the Video Producer (Youtuber)]

**Screening Question:** Do you are interested on a platform that allow you to access the the major OTT providers?

Ana is a Video Maker, she produces media content for the Youtube. She really enjoy to have access to entertainment content to be able to



produce her own content.

Her channel is centered on Critical Reviews and Recommendations of Movies and TV Shows, she is graduated on Arts and has 7 years of experience as Youtuber. Ana has a Youtube channel where post their videos, her channel has more than 1 million subscribers, 200 videos and five million views from around the world. On her profession one of the mandatory rules is that she always need to be well informed about the media content that is on the OTT platforms across the internet. She also needs to be able to watch this VOD content that is distributed across several platforms. Moreover, another of their wishes is the availability of an SVOD and TVOD libraries.



Ana is a XTelecom TV and Internet customer, that means XTelecom provides Cable TV and Internet do Ana, Ana works from home so she has only one account.

<b>Thinks</b>	Ana would like to have access to all OTT content from all major providers in a single platform.
<b>Sees</b>	Ana sees that all OTT content is spread across several proprietary OTT media platforms; what make her job difficult.
<b>Feels</b>	She feels frustrated because even though all providers own their OTT platform, this content is spread across several platforms and is impossible for search for this content in a single platform.
<b>Does</b>	So she has do every day search on all OTT platforms for updates on their inventory. Spending precious time on this task, what makes her job difficult and take longer to be completed.

## 2. Problem Scenarios, Alternatives, & Value Propositions

Here you'll lay out the specific problems you're going to solve for the user, be those habits, desires, or jobs to be done. You'll also identify their current alternative(s).



**PROBLEM  
SCENARIOS &  
ALTERNATIVES**



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

Problem Scenarios	Current Alternatives	Your Value Proposition
-------------------	----------------------	------------------------

Ana wants to be able to search by all major OTT platforms in single environment.	Currently she has to search in all platforms individually.	Bla Play OTT Aggregator will provide A search mechanism that allows anyone to search on all OTT providers registered on the service.
Ana would like to not have to login on each OTT platform individually	Currently she is obligated to login on each one OTT platform.	Bla Play should provide an Single Sign On system that enable the login on all OTT platform in an invisible way to the user.
Ana would like to find the TV Guide for all Bla Cable TV Channels in a single place.	Currently she has to access each channel on the TV or his respective web site to know which movie or TV show will be presented on each schedule on each Channel.	Bla Play will provide an TV Guide to present all Schedule for Cable TV for 15 days in the future.
Ana would like to have access to a SVOD library provided by her telecom as a bundle on the services that she already has.	Currently she has pay externally for each SVOD platform available on the market.	A SVOD library would provide Bla Telecom a add on service to offer to their customers.
Ana would like to be able to purchase Pay Per View on the web to watch on her TV.	Currently she has to purchase by phone/sms.	Integration with Bla Telecom PPV purchase system to allow PPV purchases through the portal.
Ana would like to have access to a TVOD library, composed of the most recent movies/shows.	Currently she has access only by PPV on the TV.	A TVOD library would provide an extra revenue to the company as also a value product to the customers, that will have access to the most recent movies and shows.

### 3. Customer Interview Guide

Here you'll lay out the specific problems you're going to solve for the user, be those habits, desires, or jobs to be done. You'll also identify their current alternative(s).



[TUTORIAL & EXAMPLES](#)

#### PERSONA HYPOTHESIS

Question Form

Your Questions HERE

<b>Tell me about [yourself in the role of the persona]?</b>	[your questions here]
<b>Tell me about [your area of interest]?</b>  (area of interest is the general space that you're looking at- measurement of technical skills in the case of Enable Quiz, for example)	[your questions here]
<b>Tell me your thoughts about [area]?</b>	[your questions here]
<b>What do you see in [area]?</b>	[your questions here]
<b>What do you feel about [area]?</b>	[your questions here]
<b>What do you do in [area]?</b>	[your questions here]

**PROBLEM HYPOTHESIS**

Question Form	Your Questions HERE
<b>How do you currently [operate in area of interest- if you don't have that yet]? OR Here's what I got on [x]- is that right?</b>	[your questions here]
<b>What's [difficult, annoying] about [area of interest]?</b>	[your questions here]
<b>What are the top [5] hardest things about [area of interest]?</b>	[your questions here]

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<b>What are the top 5 things you want to do better this year in [general area of interest]?</b>	[your questions here]
<b>Why is/isn't [your specific area of interest on that list]?</b>	[your questions here]

### VALUE HYPOTHESIS & CUSTOMER CREATION HYPOTHESIS

For the most part, these need to be established with direct experimentation: concierge MVP's, pre-sales, landing page tests, etc. See here for more on that: [Your Lean Startup](#).

### **CLOSING AND MISCELLANEOUS**

<b>Question Form</b>	<b>Your Questions HERE</b>
<b>Casting a Line ("Anything else?")</b>	[your questions here]
<b>Housekeeping and Follow Up</b>	[your questions here]



## 4. Assumptions & Experimentation Vehicles

Here you'll work through value proposition design and laying out the key assumptions you need to test for your new idea to become a successful innovation.



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

### What is the product hypothesis?

For Bla (Telecom company, provides Land lines, Internet, Cable TV and Mobile Phones) TV and Internet customers who desires access Over the Top (OTT) content from several sources in a single place, the Bla Play is a OTT aggregator that provides in a single portal access to Video on



Demand (VOD) content from more than 30 providers (HBO, TNT, FOX...). Unlike Netflix, our product we are not restricted to only one library of content we can provide access for more than 20.000 media assets through the metadata aggregation and proprietary Subscription Video on Demand (SVOD) and Transactional Video on Demand (TVOD) content.

## What are the key assumptions?

#	Priority*	Key Assumption	Needs Proving?	Experimentation
1	1	If we provide access to third partner content (HBO, TNT...) for Bla customers, they will stay on our platform 18% in average.	Yes	<ul style="list-style-type: none"><li>- Wizard of Oz: Get the user to the page, and we explain the service and see if at least 10% seems interested and begins to browser through the platform.</li><li>- Concierge: We build up a simple site just with the top 100 assets available on the library, selected manually to favour paid assets.</li><li>- MVP: Time to time give access to third partner content to new users to attract them.</li></ul>
2	2	If we provide the possibility of use of Bla Login System (OAuth 2) for Bla customers, they will be 25% more willing to make the first login.	Yes	<ul style="list-style-type: none"><li>- Wizard of Oz: We send an email to Bla Customers to let them aware of the service.</li><li>- Concierge: Offer also the possibility to login with social media</li><li>- MVP: Add a button login and after clicked display the login options</li></ul>
3	3	If we provide a Subscription Video on Demand service and have a recommendation toll we could try sell PPV/Push VOD e TVOD for Bla customers, they will be	Yes	<ul style="list-style-type: none"><li>- Wizard of Oz: configure the recommendation tool to allow paid assets</li><li>- Concierge: Offer bundle of paid content</li><li>- MVP: Give 10% off on the second buy</li></ul>

		more willingly to buy other premium assets.		
--	--	---------------------------------------------	--	--

\* I suggest the following scale-

1: Pivotal assumption. If this is disproven, the venture needs to be canned or go through a fundamental pivot.

2: Child detail of a pivotal assumption.

3: Child of above.

(end truly pivotal assumptions)

4: Extremely important assumption. This assumption substantially affects key profit drivers.

5: Important assumption. This assumption affects key profit drivers.

6-10: Tactical assumptions for incremental improvements in various areas.

X: Not sure of the priority of this assumption. Not being sure of the priority is much better than skipping it!

## 5. Experiments: Testing Your Assumptions

Here you'll lay out effective experiments to testing your proposition and make sure you're building something that someone wants.



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

### NOTES

The following provide a pair of example experiments around our example company, Enable Quiz.

Enable Quiz- Concierge MVP	
What assumption will this test?	<p>This MVP will test our high-level Value Hypothesis:</p> <p>If we offer HR managers at companies that hire a lot of engineers a lightweight quizzing app, they will convert to paid subscription.</p>
How will we test it?	<p>We'll start with custom-built quizzes on Google Forms to assess the basic value of the product to the HR manager. We'll reach out to HR managers from our customer discovery work who have agreed to participate. Each has 1-2 open positions where we have screening quizzes based on the specifics of the open position.</p> <p>The quizzes have been made available to the HR managers and we've finished 0 day/usability testing to validate that they can use the quizzes and find the scores (which we post to a Google Doc for them after grading them by hand).</p>
<p>What is/are the pivotal metric(s)?</p> <p>What is the threshold for true (validated) vs. false (invalidated)?</p>	<p>Unpacking our high level assumption, we'd like to test-</p> <p><b>1: If we create position-specific quizzes for HR managers, they'll use them ~100% of the time and, after two positions, the metric is [quizzes administered]/[candidates interviewed].</b></p> <p>We'll measure [quizzes administered] based on the number of position-specific quiz forms we receive. We've added a checkbox to help make it easier to discard junk forms. Also, there's a name or initial field which we use to correlate back to the interview with the HR managers to make sure they have systematic calendaring on the interviews they do so that even if they don't keep track of the count we can work with them after the fact to check the count.</p> <p>Our target threshold on this is <b>90%</b>. Given the hand-help set up, etc., we're providing, if the quiz isn't compelling to the HR manager such that they use it for most job candidates, then we'll likely need a substantial pivot.</p> <p><b>2: If the HR managers use the quiz, they'll send through &lt;1/2 as many candidates. For this, our metric is a comparison of [candidates screened out by the functional manager- baseline vs. with the quiz].</b></p> <p>This test will be of an approximation. Based on interviews with both HR &amp; functional managers, around 2/3 of candidates</p>

	<p>functional manager based on some material deficit in skill set. We've provided a working Google Doc for HR managers cases where they don't already have this. We'll check in with them weekly to (gently) work to keep this form up to date, upkeep of this.</p> <p>We'd like to to see the ratio of candidates screened out drop to <b>roughly</b> 1%. This may be aggressive particularly since w 'easier' quizzes to avoid false positives (incorrectly screening out candidates with a possibly adequate skill set).</p> <p>3: If we offer the service at [x] price with [y] supplemental assistance, companies that hire a lot of engineers will pay [z]. <b>ability to sell a package</b> where we charge them \$100 for a subsequent custom-created quiz.</p> <p>We believe this is a better test than a pre-pay for the service since we think such a transaction for a few-hundred dollars adequately compelling for an HR manager to sell internally.</p> <p>We'd like to see at least <b>50%</b> of the subjects opt for a subsequent quiz, assuming success on the above two tests.</p>
What will you do next if the result is true? False?	<p>If all three tests validated, we will proceed with a 1.0 of the Enable Quiz software, limited to just a few specific topics (see decision-making on that).</p> <p>If 1 &amp; 2 only pass, we will consider the circumstances and reasons for that and review price point, purchaser, and, likely itself.</p> <p>If no tests pass, we will step back and consider the a) whether a different take on the value proposition might be relevant is truly important.</p>
How much time, money will it take to set up?	<p>Based on the current 5 technical topics we estimated that total set up for all 5 subjects will involve:</p> <ul style="list-style-type: none"> <li>- 20 hours of work by our product lead to set up, user test, and document (for user) the quiz infrastructure on Google Forms</li> <li>- 40 hours of work by our technical lead to formulate and validate (with subjects) the quiz questions across the 5 subjects</li> </ul>
Roughly, what will it take for each individual test?	<p>For each subject (5), we think it will take our product lead:</p> <ul style="list-style-type: none"> <li>- 3 hours for initial Q&amp;A and onboarding (including travel, etc.)</li> <li>- 3 hours across the quizzing to answer misc. questions</li> <li>- 3.5 hours to grade the quizzes (assuming 20 quizzes/position)</li> </ul>

	- 1 hour of misc. follow-up by our technical lead
<b>Roughly, how long will it take for each test to run and produce definitive, actionable results?</b>	The interview cycle runs for 3-5 weeks after which we expect to have a full set of results on-hand.
<b>Enable Quiz- AdWords MVP</b>	
<b>What assumption will this test?</b>	This MVP will test our assumption about which technical topics are most promising for our hypothetical 1.0. There are many factors to consider and our intuition is that the right topics will a) be popular/in demand with employers b) overlap with the market we can reach affordably with regard to keyword phrases.
<b>How will we test it?</b>	We have assembled a list of popular topics and workable keyword phrases 'hire [Ruby] developer', etc. and plan to run our AdWords campaigns to determine the top 10 most promising topics.
<b>What is/are the pivotal metric(s)?</b>	The pivotal metrics here are- 1: Absolute click-through-rate (CTR) After a few iterations, we'd like to see a <b>CTR of 2%</b> on any topic we consider. Below this, we're not sure our current assumption that the Customer Creation Hypothesis hold together. We'd like to see at least ~100 impressions on each iteration, with an estimate of the number of iterations/topics (this is a blend since we're planning to use similar patterns across topics).
<b>What is the threshold for true (validated) vs. false (invalidated)?</b>	2: Comparative CTR Beyond this, we'll initially rank topics by CTR.
<b>What will you do next if the result is true? False?</b>	If true, we will pursue a 1.0 of the product with the top 10 topics.  If false in that none of the CTR's are >2% after we feel we've tested a reasonable set of alternative keywords and ad+landing pages, then we'll a) revise our Customer Creation Hypothesis and consider alternative Channels and b) pursue an alternative assumption for target customers (example: looking at job postings for target customers).

<b>How much time, money will it take to set up?</b>	Setting up and tuning the campaign (including AdWord & landing page creation and iteration) will take: <ul style="list-style-type: none"><li>- 20 hours by our product lead</li><li>- 20 hours by our 'growth hacking'/marketing contractor, costing \$1,600</li></ul>
<b>Roughly, what will it take for each individual test?</b>	The above includes both setup and our estimate on tuning. After that, we should have a usable set of results.
<b>Roughly, how long will it take for each test to run and produce definitive, actionable results?</b>	Based on search frequency of our preliminary keywords and the need to iteration, we think we'll need 10 days for each test.

Enable Quiz

<b>What assumption will this test?</b>	If we provide access to a library that is composed of an aggregation of third partner OTT content (HBO, TNT...) for Bla custom increase of 10% on the willingly of stay on our platform after first visit.
<b>How will we test it?</b>	During the customer's interviews add some questions about availability of OOT library in relation with their acceptance on beca
<b>What is/are the pivotal metric(s)?</b>	Amount of returning visitors, the expectation is to have an increase of 10% on returning visitors after providing OTT library feat
<b>What is the threshold for true (validated) vs. false (invalidated)?</b>	On the interviews, the questions: "If we provide a Video platform composed of SVOD and TVOD libraries you would be willing platform for a second visit?" and "If we provide a Video platform composed of OTT, SVOD and TVOD libraries you would be v platform for a second visit?" The sum of the answers on each one of those questions can indicate if worth to build this featur
<b>What will you do next if the result is true? False?</b>	If true/validated, we will then build the OTT library and scale to production which will move us toward our goal of provide a r entertainment video platform. If false/invalidated, we will then rethink on how to satisfy the customers which will move us toward our goal of provide a mu video platform.
<b>How much time, money will it take to set up?</b>	To set up the experiment it will take: - [\$0] and [4] hours of [build simple prototype by PO] - [\$0] and [2] hours of [create questionnaire by PO] - [\$0] and [0.01 per beta user] hours of [sent quiz to beta users by PO]
<b>Roughly, what will it take for each individual test?</b>	- [\$0] and [0.21 per beta user] hours of [to compile the answers by PO]
<b>Roughly, how long will it take for each test to run and produce definitive, actionable results?</b>	This test will be applied on 4 groups of beta users during 2 weeks and then repeated with a new set of beta users 1 week late indicators to be analyzed are retention and amount of new users. The total amount of time needed for this test is 5 weeks



**[EXPERIMENT RESULTS]**

<b>Did the experiment work?</b>	Yes, it worked we are able to verify that through Google Analytics that 37% of the new users when presented to the platform quickly became a user.
<b>What was the sample size and the results?</b>	[How many individuals, etc. did you test? What were the aggregate results?] We tested 200 individuals on 4 groups of 50 and we could verify that those 200 users 74 became a recurrent user of the portal.
<b>Conclusions?</b>	I can infer that my assumption was partially correct, because even though we got an increase in retention of the users. The increase was imagined.

## 6. User Stories & Prototypes

Here you'll translate what you've learned and what's right for the product into testable narrative you can use to drive high quality collaboration with your (agile) development team..



**USER STORIES  
& PROTOTYPES**



[TUTORIAL & EXAMPLES](#)



[WORKSHOP](#)

### User Stories

**[PLACE YOUR EPIC STORY HERE] [copy and paste this heading and table as needed for multiple epic + child story sets]**

Story	Test Cases
[add]	[add]
[add]	[add]
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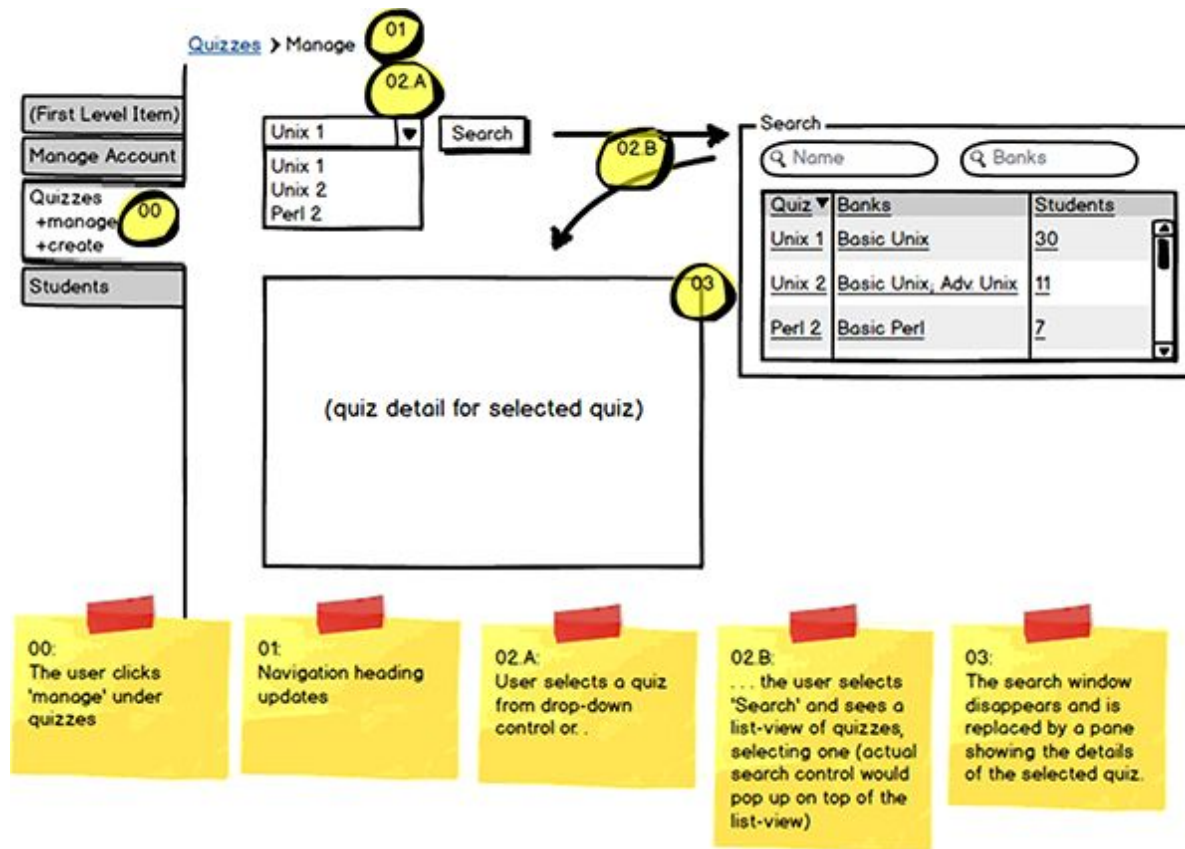
## Prototypes

**Do we really know what we want? Can we describe it with wireframes and prototypes?**

### **NOTES**

Below you'll find an example and notes. For more on this, including a tutorial and the Balsamiq source with the rest of the examples, see:  
[CREATING YOUR FIRST PROTOTYPE IN 30 MINUTES](#).

Thinking through a few of our stories at Enable Quiz, I (Andrew) sketched out the following idea for navigation and a few of the key controls:



...see this item if you'd like to see the full tutorial and the example Balsamiq files:

[CREATING YOUR FIRST PROTOTYPE IN 30 MINUTES.](#)

## How do we test our user interface?

(see Appendix B- Usability Testing)

## 7. Business Model Canvas

### What's the business model?

#### **NOTES**

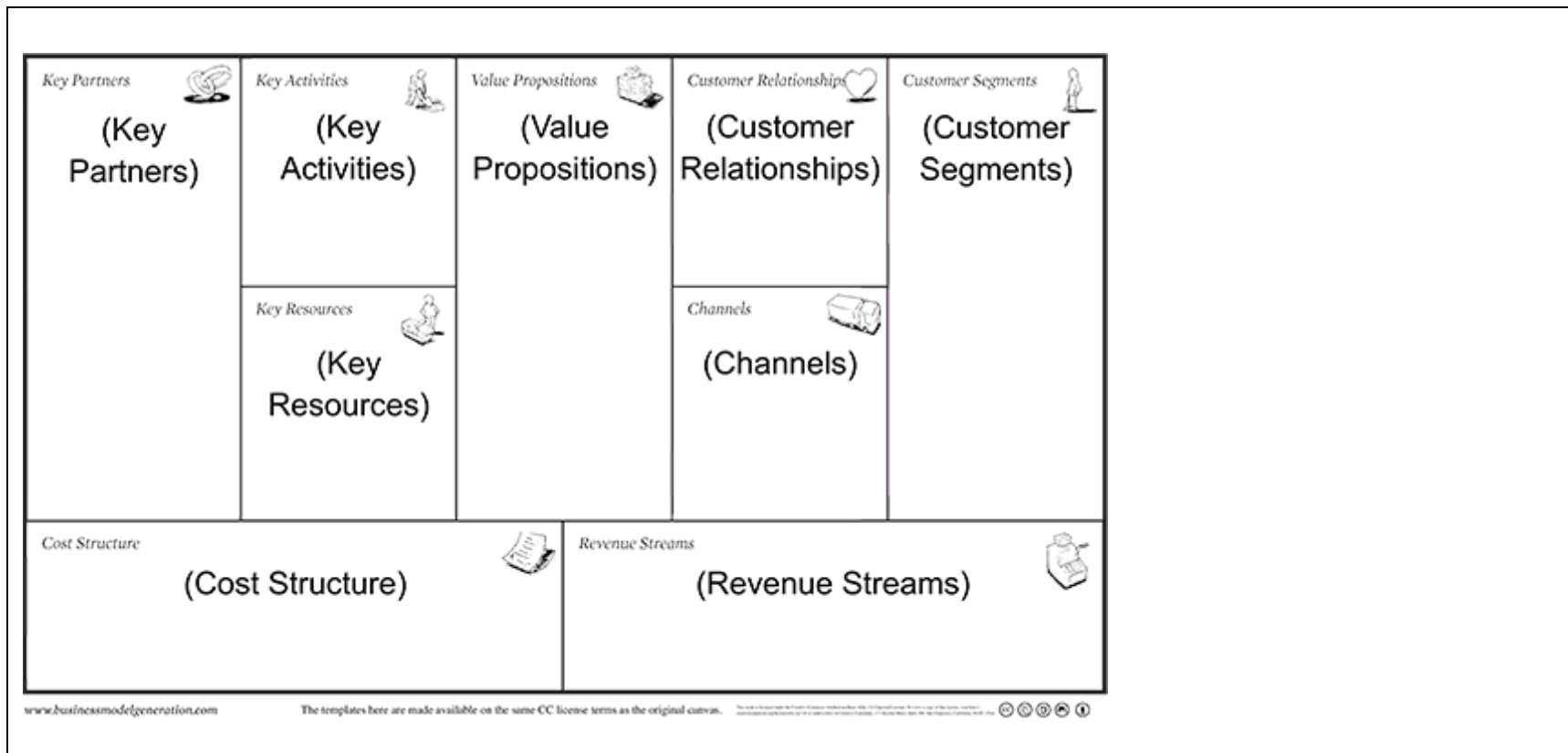
At the foundation of your venture should be your personas & problem scenarios: what is your point of view on the customer and what they want? At the operational core, you have lean style experimentation- an ongoing evidence-based innovation process for both product and promotion. The Business Model Canvas (not mentioned in the items above) is a good way to articulate your business model and the table below shows resources for that. User stories & test cases then guide your executions on product and promotion. These items together provide a high-functioning set of tools and explicit, sharable definitions of what you're doing.

If you then need to write a traditional business plan or investor pitch for a certain audience, go ahead and do that. Just don't make the mistake of having that be your core item for managing the business.

Here are a few items that will help you in this area:

<b>TUTORIAL</b> <a href="#"><u>BUSINESS MODEL CANVAS</u></a>	This links to a page that has a tutorial and a few different templates (PDF, Omnigraffle, Google Doc's/PPT) for creating your business model canvas.
<b>TEMPLATE</b> <a href="#"><u>BUSINESS MODEL CANVAS</u></a>	This is a template in Google Doc's Presentation format.





## 8. Economics & Financing

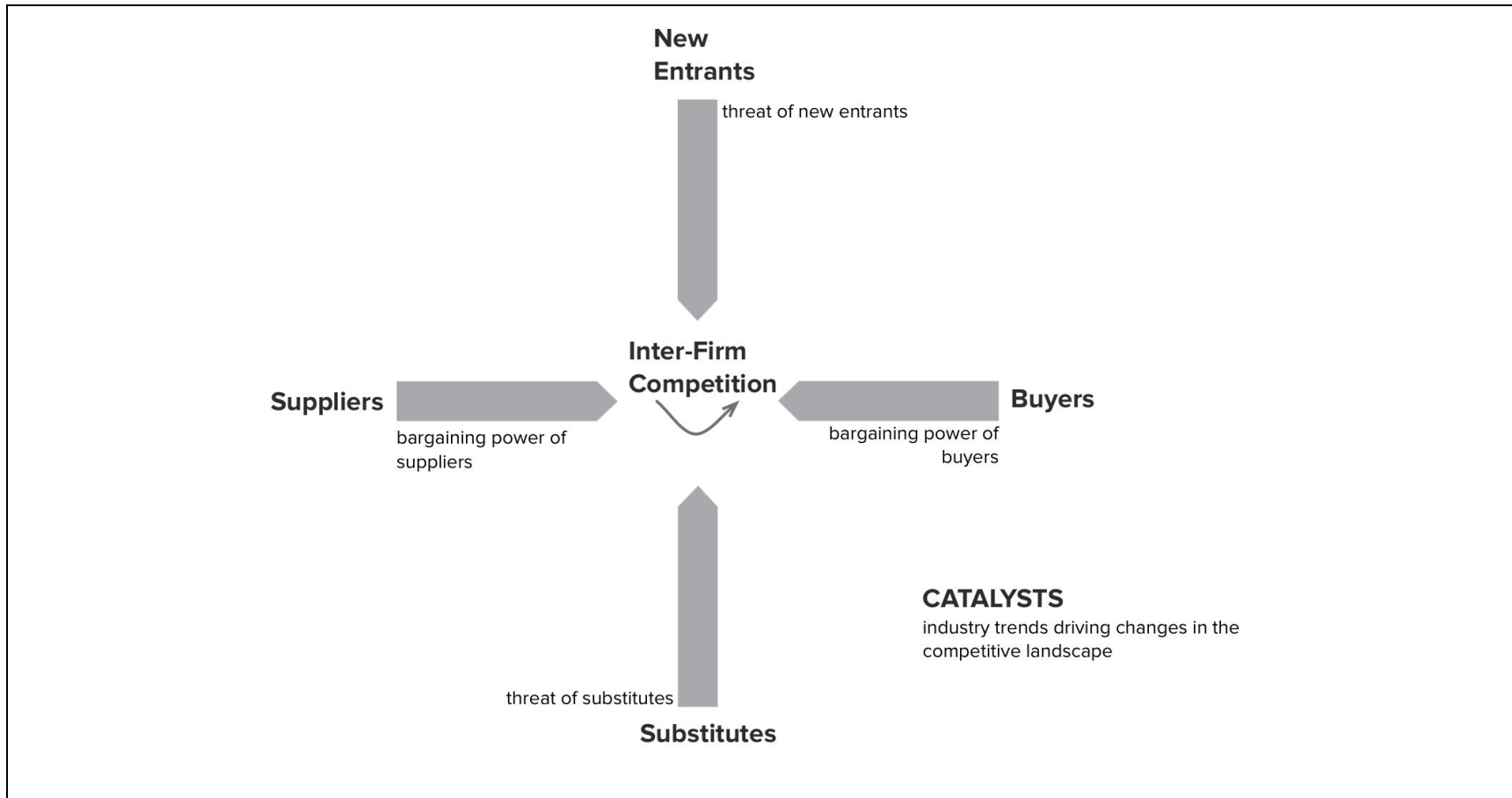
### **NOTES**

Shortly this will have an overview of a lean financial model. Right now that's in 'Coming Soon' status. When it's up, the item will be online here: [LEAN FINANCIAL MODEL](#).

## 9. Competitive Environment

### **NOTES**

Shortly this will have a template for doing the Five Forces analysis. For now, please see this tutorial: [FIVE FORCES TUTORIAL](#).



Force	Notes
Threat of New Entrants	[add]
Threat of Substitutes	[add]

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<b>Bargaining Power of Buyers</b>	[add]
<b>Bargaining Power of Suppliers</b>	[add]
<b>Intensity of Competitive Rivalry</b>	[add]

## Appendix A: Customer Discovery Notes

Visit [Place, Date+Time] (copy as needed)

<b>AUDIENCE</b> (Name? Company? Do they map to a persona?)	[add notes]
<b>VENUE/CIRCUMSTANCE</b> (Where? Why?)	[add notes]
<b>NOTES ON THE PERSONA</b> (What was on their A-list? What were they like? Think-See-Feel-Do?)	[add notes]
<b>NOTES ON PROBLEM SCENARIOS</b> (Which ones did they have? What alternatives? What value propositions might resonate?)	[add notes]

<b>INSIGHTS ON PERSONAS &amp; PROBLEM SCENARIOS</b> (How did the interview prove or disprove key assumptions on your personas and problem scenarios? How else did they change your point of view)	[add notes]
<b>OTHER INSIGHTS</b> (Right them down ASAP after you have them! Otherwise, you'll probably forget.)	[add notes]

## Appendix B: Usability Testing

For background on what this is and how to use it, please see the section [Usability Hypothesis in the Customer Discovery Handbook](#).

### Enable Quiz- Exploratory Suite I

#### Objectives & Methods

There are three general types of tests:

- Exploratory: for learning about customer problem scenarios in greater detail, sometimes with a paper or working prototype
- Assessment: for testing the usability of an early direction on product implementation
- Validation: for later stage final testing of an implementation

This test suite is exploratory and we're preceding the user testing with customer discovery interviews from [Appendix A](#) to deepen and align our view of personas and problem scenarios with the exploratory test results.

#### Product Version

We'll be using version [0.1] of the product for this exploratory test. [NOTE: They could easily be using paper or PowerPoint prototypes as this stage as well]

#### Subjects

Since enabling the HR manager persona to be more effective is central to our value proposition, our target weighting of subjects should reflect that. An ideal total and mix of subjects would be:

[Helen \(or Hank!\) the HR Manager](#) 4

Frank the Functional Manager 1-2

The screening question for both these subjects type are-



[Helen \(or Hank!\) the HR Manager](#)

How many technical job candidates did you screen in the last month?

### Research Composition

#	Item	Duration (min.)	Notes
1	Intro. & Explanation	5	Here we will explain the objectives of the test and the parameters of their participation. We'll also obtain the designated release & consent form*.
2	Discovery Questions	20	Using the interview guide, we'll spend a few minutes to discovery to improve our personas, problem scenarios and user stories.
3	Test Tasks	15	We'll introduce the test scenario and then ask them to complete the Test Items.
4	Post-Test Debrief	5	Make sure we ask if it is OK to follow-up with additional questions.

### Pre-Session Checklist

#	Item	Notes
1	Make sure have written versions of discovery and test questions to refer to	
2	Make sure test instance is up and functional	- log in - make sure app is on starting page
3	Make sure recording equipment* is up and functional	

## Session Design

### Intro

Thanks for making time to take part in our study. My name's [name] and this is [observer]. [Explain participation and deal with consent form/obtain written consent]\*

We'll be using a test guide through the rest of this, so I hope you won't mind me referring to that.

We're here to learn about [an early version of a solution that allows HR managers to assess the technical skill set of a job candidate through an online quiz].

I'm going to ask you some questions and give you some tasks. Feel free to think out loud if you're comfortable with that. We're not here to test you and there are no wrong answers. Our results just help us better understand our product and its audience.

The session will take roughly [40-60] minutes.

Do you have any questions before we start?

### Test Items

#	Research Objective	Est. v. Actual (min.)	Notes
1	Exploratory Intro	5	<u>MODERATOR GUIDE</u> Let's say your job is to create one of these quizzes for an open position. Here's a description of the position [Provide them sample job description and let them review.]. Let me know when you've finished reviewing it and if you have any questions.  <u>OUTPUT</u> Validation that the subject understands their goal and the job description, roughly as well as they would in their current position.

2	Assess primary navigation for new quiz creation	2	<u>MODERATOR GUIDE</u> Let's say you want to create a new quiz. What would you do?  <u>OUTPUT</u> Assessment of primary navigation for new quiz creation
3	How are we doing on this user story: <i><a href="#">As an HR manager, I want to match an open position's required skills with quiz topics so I can create a quiz relevant for candidate screening.</a></i> ?	5	<u>MODERATOR GUIDE</u> Tell me what you think you're seeing here?  Let's say you wanted to choose a set of quiz topics for the open position you just reviewed. Show me how you'd do that?  <u>OUTPUT</u> An assessment of the user's relationship to the available affordances and their appropriateness to the current user narratives and tasks.
...	...	...	...

#### NOTES ON TAKEAWAYS

Personas & Problem Scenarios	[...]
UI and User Stories	[...]

#### Post-Test Debrief

- Thanks so much. We'll be using this to make the product and solution stuff like documentation better.
- Would you mind if we send you follow-up questions?
- (if you're giving them some kind of tangible thank you, make sure that gets done)

\* I don't supply legal advice on this site and I don't warrant these notes as fit for legal compliance. As well it should be, recording individuals is

subject to various laws and regulations depending on who you are, who they are, where you are, and how the recording will be used and stored (among other factors). It's important that you get advice from your legal counsel and maintain transparency and applicable compliance with your subjects. At a minimum, this means securing written releases for the recordings and making sure that the recordings are stored and accessed securely (if you store them at all). Regarding releases and consent, your specific compliance requirements will vary, but here are a few sample consent forms from US institutions:

[Usability.gov](http://Usability.gov)

[Indiana University](http://Indiana University)

FOR THE FULL SET OF EXAMPLES & DESCRIPTION, SEE: [USABILITY TESTING IN THE CUSTOMER DISCOVERY HANDBOOK](#)

## [Company Name] [Type of Test {Exploratory, Assessment, Validation}] Suite [#]

### Objectives & Methods

[describe]

### Product Version

[define]

### Subjects

[describe- link to personas above if at all possible; this will help you]

### Research Composition

#	Item	Duration (min.)	Notes
1	[...]	[...]	[...]

2	[...]	[...]	[...]
3	[...]	[...]	[...]
4	[...]	[...]	[...]

## Pre-Session Checklist

#	Item	Notes
1	[...]	[...]
2	[...]	[...]
3	[...]	[...]

## Session Design

### Intro

[everything you want to explain to the participant; be sure to obtain legally compliant consent and release as needed]

### Test Items

#	Research Objective	Est. v. Actual (min.)	Notes
1	[...]	[...]	<u>MODERATOR GUIDE</u> [...]  <u>OUTPUT</u> [...]

2	[...]	[...]	<u>MODERATOR GUIDE</u> [...]  <u>OUTPUT</u> [...]
3	[...]	[...]	<u>MODERATOR GUIDE</u> [...]  <u>OUTPUT</u> [...]
...	...	...	...

NOTES ON TAKEAWAYS [copy and repeat this section for each subject]

Personas & Problem Scenarios	[...]
UI and User Stories	[...]

## Post-Test Debrief

[describe]

## Appendix C: Chain of Relevance Check-In

The purpose of this exercise is for the practitioner of [Venture Design](#) to diagnose and focus their executions (be those product or promotion), and decide where and how to best invest their time and effort on subsequent iteration. Here are a few example questions:

Who were we  
doing this for?  
What makes  
them tick?

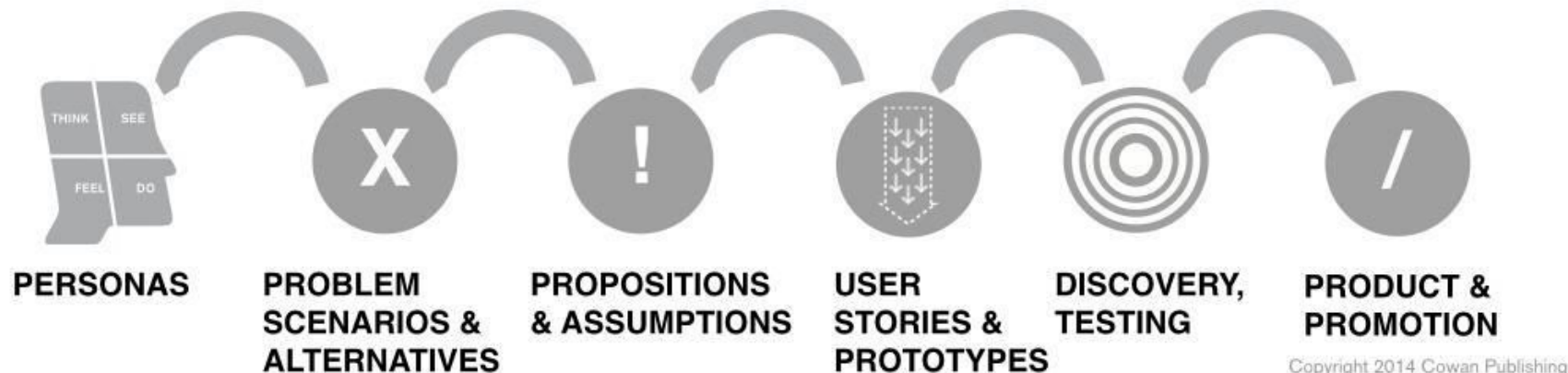
What problem  
were we solving?  
Was it  
important?  
Better vs. alt.?

What were  
the key  
propositions?  
Assumptions?

What  
understanding  
were we  
implementing?

Did our test  
predict our  
outcomes?  
Why/not?

Did anyone care?  
Like it? Use it?  
Respond to it?



Remember, one of the handy things about a Google Doc is the ease of interlinking information (vs. repeating it). You can link to current work (personas, etc.) in your current Venture Design with 'cmd + k' (Mac) or 'Insert >> Link'.

## Project Check-In Template

This template is for a quick check-in as you're focusing your work toward some future output, be it a product or promotional iteration.

Item	Notes on Diagnosis
<b>PERSONA CHECK</b> Can we find 10 people that will love the product? Could they lead to 100 more? Then 1,000? Do we know how they relate to our area?	[Does the customer exist and do you know them? An example for Enable Quiz notes here might be:  <i>The HR Manager, Functional Manager pairs exist at nearly all the companies where we've done discovery. The HR Manager generally wants to do more and the Functional Manager generally wishes they could do more on recruiting.</i> ]
<b>PROBLEM CHECK</b> Does our problem matter enough? Do we hear it as a response to open-ended questions? Do we understand the alternatives in detail?	[Is your problem on their A-list? An example for Enable Quiz notes here might be:  <i>We don't hear 'screening candidates' as an answer to 'What's hard about being an HR Manager' but we do hear it from both personas consistently in answer to 'What's hard about the recruiting process for engineers?'].</i>
<b>VALUE HYPOTHESIS CHECK</b> Do we have a tightly defined proposition?	[You'll struggle (read for startup: never) rise above the noise floor if you're an interesting thing to potentially lots of people vs. a bullseye for at least a few people. An example for Enable Quiz notes here might be:  <i>Our core value hypothesis is: If we offer HR managers at companies that hire a lot of engineers a lightweight quizzing app, they will convert to paid subscriptions after an unpaid trial.</i>  <i>We think this is the right scope and focus to deliver on the problem and loans itself to rapid, high-value testing (see next item).]</i>



<b>VALUE DISCOVERY CHECK</b> How can we test it in the next 48 hours?	<p>[The best tests are quick, creative, and aligned to where you are. An example for Enable Quiz notes here might be:</p> <p><i>We think a concierge test with quizzes on Google Doc's will allow us to a) test the core value hypothesis and b) better understand the whole cusotmer/customer team interaction with the hypothetical product. 'A' is the most important for obvious reasons but we also have a lot of learning to do on the actual contours of the solution.]</i></p>
<b>PRE-DEV CHECK</b> Do we really need SW to move forward? Are we ready to narrate what the project needs? Test it often to avoid waste?	<p>[Make sure you can articulate all substantial customer interactions with the product- not just the general arc of what the product's supposed to do. The Enable Quiz in the examples above is <i>NOT</i> ready to built software. Let's say they've validated their value hypothesis and learned enough about the quizzing process to build software. One of their epic stories might be:</p> <p><i>'As the HR manager, I want to create a screening quiz so that I can understand whether I want to send possible recruits to the functional manager.'</i></p> <p>They've defined the building blocks they need for this and looked at comparables and UI patterns. Can you describe the functional experiences you want the user to have at least at this level of detail?.]</p>

## Post-Mortem Template

Item	Notes on Diagnosis
<b>What was the execution and what constituted success/validation? What actually happened?</b>	<p>[If you were testing a feature pre-release, this would be the customer outcomes you hope to see. For instance, if Enable Quiz was testing a new interface for quiz creation, their answer might be:</p> <p><i>We're building a new quiz interface and we hope to see 90% of HR Manager users creating their first quiz within 7 days without contacting support.</i></p> <p><i>Out of [n] signup's, [x%] of our HR Manager users creating a working quiz within [y] days, constituting [validation, invalidation] of our current execution]</i></p>
<b>Did our testing predict our outcomes?</b>	<p>[At a high level, I like to divide up testing into work that delivers on three main buckets- Persona &amp; Problem Hypothesis: Discovery interviews &amp; observation.</p>

Value Hypothesis: MVP & other product proxy testing.  
Usability Hypothesis: Product usability against specific (supplied) goals. For more, see the '[Customer Discovery Handbook](#)'.

Depending on your execution, you may wish to take note on your work of against any or all of these.

For example, if Enable Quiz had validated their persona, problem, and value hypotheses and was principally focused on onboarding customers out in 'the wild', their answer might be:

*Persona Hypothesis: After interviewing dozens of subjects screening into the 'HR Manager' and 'Functional Manager' personas, we have converged on a consistent set of perspectives and points of view. Future re-segmentation is likely but for an initial offering, we feel we have a solid working validation of what drives these personas.*

*Problem Hypothesis: Generally in response to broad questions about HR management and hiring by the HR managers and functional managers (respectively), we have consistently heard from HR managers that screening technical candidates is a top problem and for functional managers that spending enough time on recruiting is a top problem. Our current point of view is that this constitutes an adequate working validation of our pivotal problem scenarios.*

*Value Hypothesis: We have run two MVP vehicles to test our value hypothesis. The first, a concierge MVP, was a set of custom-built paper quizzes for a sample of 5 HR managers involved in technical recruiting. Our 0 day test was to make sure we could create relevant quizzes against their job descriptions (check). Our 30 day test was to see how frequently the HR managers were actually using the quizzes. We knew this because they would email them to us for grading. Usage was in line with our expectations (around 75% of candidates). Our 90 day test was to see if the quizzes were driving better outcomes for their hiring. We're still monitoring these for a more definitive/controlled result but the initial results are positive.*

*Usability Hypothesis: We moved from exploratory to assessment to (rough) validation testing with the 1.0 interface. 90% of the subjects were able to complete a quiz against an open position in validation testing.*

**Testing vs. Actuals:** *Our testing would have predicted that roughly [x%] to [y%] of the HR manager users would successful create a quiz. In the field, we were at [z%], which is a relatively [good, bad] rate of predictability and we plan to [look at the results more, as applicable].*

**NOTE:** Your work may have more gaps than this (hypothetical) firm. Don't feel like you have to have all

	these items nailed- the purpose of this exercise is to identify where you have your most important gaps in understanding and validation.
<b>What understanding we were implementing?</b>	<p>[Here your job is to note the inputs- user stories and (possibly) wireframes. For Enable Quiz this might look something like:</p> <p><i>The user stories and prototypes we implemented against are in sections <a href="#">[X]</a> &amp; <a href="#">[Y]</a> of the Venture Design. We feel these described the implementation reasonably well and <a href="#">[other ideas]</a>. ]</i></p>
<b>What were the key propositions? Assumptions?</b>	<p>[Here your job is to make sure your proposition(s), the definition of what you're doing that's better enough than the alternative at solving user problems, is clearly laid out and linked to the previous items. Here's an example from Enable Quiz:</p> <p><i>The key proposition here was about the value to the HR manager of being able to better screen technical talent and how that would drive both the effectiveness and hiring outcomes for the functional manager. Generally, the assumptions regarding the usefulness of screening to the HR Manager are relatively well validated. The impact (and perception of that impact) and outcomes for the functional manager we're still investigating and testing. The specifics are available in the <a href="#">assumptions section</a>. ]</i></p>
<b>What problem were we solving? Was it important? Better than the alternatives?</b>	<p>[Here your job is to clearly lay out the problem scenario(s) and alternative(s) you're addressing. Here's an example from Enable Quiz:</p> <p><i>Our core problem area is the recruitment of technical talent. Under that problem, we're principally interested in problem scenarios around how HR managers screen technical talent at the front end of the recruiting process, where currently they use a patchwork of references and paperwork review (resume, etc.). For more detail see <a href="#">[section herein with problem scenarios]</a>.]</i></p>
<b>Who were we doing this for and do we know what makes them tick?</b>	<p>[Here your job is to make sure the above items connect backward and anchor in relevance to one or more personas, be those buyers and/or users of your product. Here's an example for Enable Quiz:</p> <p><i>We have two principal personas: Helen the HR Manager and Frank the Functional Manager. Helen's key motivation is to contribute more to one of her firm's key activities- technical recruiting. We think that our ability to help her do more through lightweight technical screening quizzes is what's pivotal to the purchase and use of our product.</i></p> <p><i>Frank the Functional manager will see substantial benefit once the product is in place in the form of less</i></p>

	<i>time wasted on non-qualified candidates and ultimately better recruiting outcomes. ]</i>
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## Venture Design Submission (Classes)

This template for you to review the completeness of your submission and focus where you are on things and what has to happens next.

The left column, 'Items- Checklist', is just for you to run through your venture design and make sure everything's in there. The right column, 'Notes on Diagnosis', is for you to make notes on what you've updated and why. The questions in that column you can remove. They're a guideline on what to cover in your diagnosis.

Items- Checklist	Notes on Diagnosis
<b>Persona</b> :: Photos?  :: Does the description reflect what you've learned about key facets of what makes them tick? Their day?  :: Can you think of at least 5 examples of the persona?  :: Does the 'Think' reflect the tension between how they'd like things to be vs. how they are now?  :: Does the 'See' reflect the points of contact and influence you've observed?	[How has your perspective on the persona evolved? What turned out to be important? How did your screener and interview guide work out? What would you/did you change? What would you most like to learn more about?]

<p>:: Does the 'Feel' speak to the emotional drivers that you think will motivate action?</p> <p>:: Do you know what the persona specifically 'Does' in your area of interest? How much/how often?</p> <p>:: Does your interview guide draw out the answers to the above?</p> <p>:: Does your day in the life shed light on key moments in their day?</p> <p>:: Did you push yourself to test actionability of the persona with Google AdWord concepts?</p>	
<p><b>Problem Scenarios</b></p> <p>:: What are the important problem scenarios? Alternatives?</p> <p>:: How do they look when you think upward in terms of abstraction (why?) and downward (how?)?</p>	<p>[What problems turned out to matter vs. not? Are you able to tie all your user stories back to problem scenarios?]</p>
<p><b>Value Propositions</b></p> <p>:: Do you have VP's that deliver against the Problem Scenarios and Personas above?</p> <p>:: Do your Before &amp; After storyboard(s) help you think about and communicate those propositions?</p> <p>:: Did you describe them in the Business Model Canvas (optional)?</p>	<p>[How has your view of the propositions evolved? What's important and likely to be valuable? How does that differ between segments (sides of a marketplace, for example) and personas?]</p>

<b>Your Project as Experiment</b> :: What are your most important assumptions?  :: How does your AIDAOR storyboard and journey map help you think through those assumptions?  :: Are they framed in testable terms: If we [x == do something] for [y == persona] then they will [z == respond in a certain, measurable way].	[How has your view of the assumptions changed? Beyond your core Value Hypothesis of whether buyers/users will come, what others have emerged as important?]
<b>Testing Motivation</b> :: What experiments could you run and are they structured in the template with assumptions, methods, metrics, and post-experiment actions?  :: What is the scrappiest thing you could do in the next 48 hours to test customer motivation? (Not that doing so is part of the assignment)	[Based on what you know now, do you see better opportunities or ideas to test motivation before you (or the venture's principals) spend time and money on the venture?]
<b>Narrative Collaboration via User Stories &amp; Wireframes</b> :: Do you have epics and then child stories and test cases that describe them?  :: Did you storyboard the key epics to get at detail?  :: Did you pull applicable comparables and UI patterns to help you build on best practice for the key stories?  :: Did you wireframe the key stories to think about implementation?	[How has your view of the specific customer narratives evolved? Do you think they're ready for implementation? What best practices do you think you can leverage to maximize existing behavior models on the part of the user? Do the user stories tie back to your work elsewhere? Do they tie back to your problem scenarios?]

## Usability Testing

:: Do you have an exploratory testing design that's anchored in user stories?

:: Do your interactive wireframes support it?

:: Have you tried it out? What insights did it yield?

[How has your view of how to execute the user testing evolved as you exercised your test suite (stories, wireframes, script, test design)?

What changes, focal points did the user testing provide?]

## Appendix D: Google AdWords Exercise

This is a template for the exercises we do in [Sessions 2 & 3 in my Software Design Class](#). Their purpose is to help you push yourself and test the actionability of your [personas](#)- do you really know what make them tick? What they Think, See, Feel, and Do in your area?

### New text ad

Write your text ad below. Remember to be clear and specific. [Learn how to write a great text ad](#)

**New!** Count down to the end of your sale (or any other event). Type a brace and equals sign '{=' to set this up.

Headline ?

Description line 1 ?

Description line 2 ?

Display URL ?

Destination URL ?

Device preference ? ☐ Mobile

**Ad preview:** The following ad previews may be formatted slightly differently

Side ad

Ruby-Java-DevOps-WHAT?

enablequiz.com

Are you a technical recruiter?

We can make make screening easier.

Top ad

Ruby-Java-DevOps-WHAT? - Are you a technical recruiter?

enablequiz.com

We can make make screening easier.

Keywords	
Headline	



Desc. line 1	
Desc. line 2	
Display URL	
Notes to Self	

## Appendix E Document Revision History

Table 1 Document Log

Date	By	Notes
Sept. 30, 2012	<a href="#">A. Cowan</a>	first tracked version
Oct 7, 2012	<a href="#">A. Cowan</a>	updates on using Google Trends
Feb 10, 2013	<a href="#">A. Cowan</a>	updated title updated formatting convention small, misc. edits
Mar 15, 2013	<a href="#">A. Cowan</a>	folded assumptions into main doc moved positioning statement updated, expanded example personas
June 27, 2013	<a href="#">A. Cowan</a>	little clerical clean-up's
July 9, 2013	<a href="#">A. Cowan</a>	structural clean-up's and updates
Aug 11, 2013	<a href="#">A. Cowan</a>	added AIDA section, updates to customer discovery questions and field notes appendix
Aug 17, 2013	<a href="#">A. Cowan</a>	added material on storyboards
Jan 10, 2014	<a href="#">A. Cowan</a>	tweaked customer discovery questions: linked to core customer discovery hypothesis and switched up

		order a little
Mar 21, 2014	<a href="#">A. Cowan</a>	misc edits updates on interview guide/customer discovery material
Aug 21, 2013	<a href="#">A. Cowan</a>	various updates around the current Venture Design curriculum
(various in 2014)	<a href="#">A. Cowan</a>	(didn't do a great job of tracking changes in 2014; learned that various users actually care about this in a material way; resolved to do better in 2015)
Jan 1, 2015	<a href="#">A. Cowan</a>	changed page orientation to horizontal/landscape added new section 4 on user testing re-serialized applicable headings
Feb 1, 2015	<a href="#">A. Cowan</a>	added new appendix C for 'relevance chain analysis'
Feb 17, 2015	<a href="#">A. Cowan</a>	updated section on test-driven innovation/Lean Startup
Mar 11, 2015	<a href="#">A. Cowan</a>	tactical edits on section 2 on lean, assumptions
Aug 28, 2015	<a href="#">A. Cowan</a>	added screener to persona example and template
Dec 12, 2015	<a href="#">A. Cowan</a>	removed examples, including just the links to that material integrated more of updated Venture Design iconography and terms



